# SIS 2000+ Training Manual

## **Create and Print Food Service Documents**

# **Purpose**

This program is used to create and maintain Food Service Documents, which includes Account Statements, Account Letters, Form Letters, Meal Cards, Bar codes, and Mailing Labels.

Documents are printed through Food Service Reports, Letters & Labels.

#### **How do Food Service Documents work?**

A Text Editor is combined with mail merge capabilities to produce practically any type of custom document. Data fields from the Student Editor, Faculty Editor, Patron Editor, and Food Services Accounts are available. During printing, the student's Primary Language is referenced for the document. If the Primary Language is not present, then the Home Language is used. If neither language is present, then the document language defaults to English. Faculty documents print using English. Patron documents print using the language specified in the Patron Editor.

# **Training Objectives**

Create an Account Statement

Understand the difference between Account Statements and Account Letters

Create Account Letters

Create Form Letters

Create Meal Cards

Create Bar codes

Create Mailing Labels

Understand the Print to form setting and how this setting controls the document format

Understand how to insert merge fields

Understand how to insert text

Edit and manipulate document format to accommodate window envelopes

Understand how to create a document in multiple languages

Preview and evaluate document format

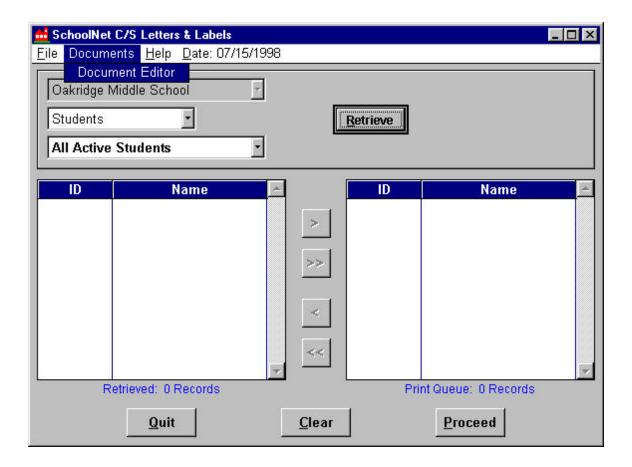
Print Documents

# Pre-requisites

None (however, student, faculty and patron data must be present in SchoolNet prior to printing documents)

# Accessing Food Services Document Editor

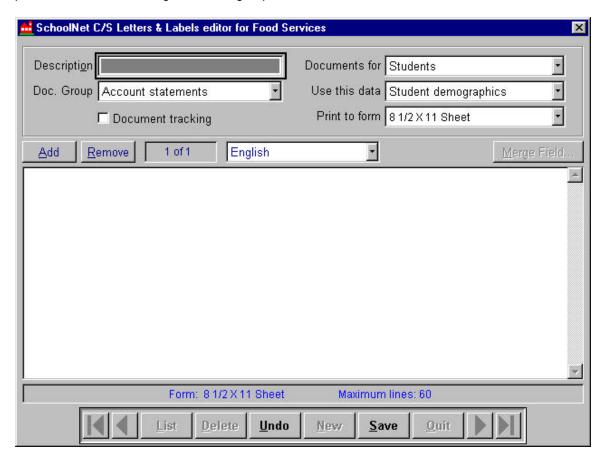
From the SchoolNet Main Menu, click on the Food Service button. From the Food Services menu click on the **Reports** button and select **Letters & Labels** from the Report Groups menu. Open the **Documents** menu pad and select **Document Editor**.



#### **Tasks**

## Create a Document Template - Account Statement

Detailed steps are provided for creating Account Statements. Other document types follow basically the same procedure, therefore only sample templates and finished documents are provided for the remaining document groups.



Click on the **New** button to present a blank document template. Complete the following:

### **Document Definitions**

#### **Description** (user-defined)

Enter the description for this account statement. Ex: Account Statement 2/sheet

#### **Document Group**

Select *Account statements*. The Document group is used to organized documents (see **List**). The *document group* has no impact on the document format.

#### **Document tracking**

Check if a printing record is maintained for this document

#### **Documents for**

Identify the target consumer type for this document (students, faculty, and food service patrons)

#### Use this data

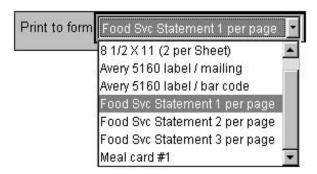
Selections available for this are determined by the *Documents for* setting. For example, **Documents for Students** determines that **Use this data** will offer *Student demographics* and *Students with account data*. *Student demographics* makes available Student Editor

## Create a Document Template – Account Statement (continued)

fields. Students with account data makes available student demographic fields plus Food Services Accounts fields.

#### Print to form

This setting controls the <u>physical format</u> to be used for this document -- the label format, the number of documents per sheet, the preset meal card, etc.



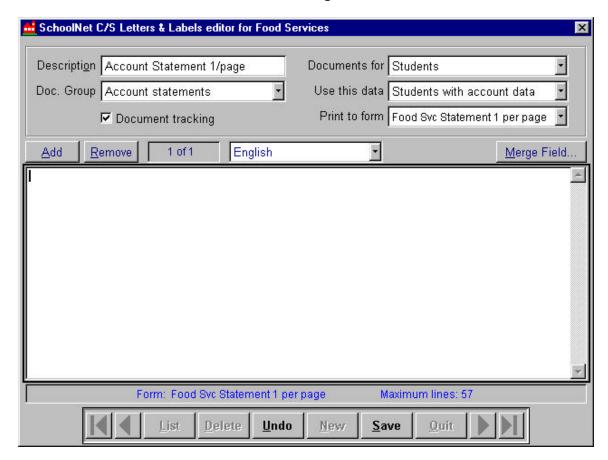
#### Please note:

All **Food Svc Statement** *Print to form* settings use a preset statement format, which includes summarized account data in the top right portion of the document. The account statement consists of three bordered areas. The upper right area is reserved for preset merge fields. The upper left may be used for text and consumer merge fields. The main body may be used for text and merge fields as desired.

# Create a Document Template - Account Statement (continued)

## **Document text**

Click on the text window to activate. Notice the Merge Field button is active.



Since **Print to form** is using a *Food Svc Account Statement* format, the upper right portion of the document is reserved for preset merge fields. These fields do not appear in the document template, but are inserted during printing. Display the document to evaluate positioning, and then make adjustments by adding or removing carriage returns.

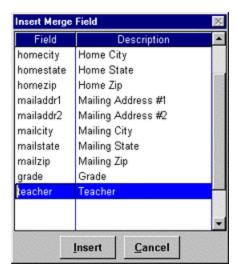
#### **Enter Text**

Follow standard text editor procedures. -- text entry, Tab, spacebar, cut & paste etc. Use the Enter key to add carriage returns. Use the backspace key to remove characters, spaces, and carriage returns.

## <u>Create a Document Template – Account Statement</u> (continued)

#### **Insert Merge Fields**

Position the cursor in the desired location. Use the **Merge Field** button (or Alt-M) or press the **Insert** key. Highlight the merge field from the list (single-click, then click **Insert**, or double-click on the Field or Description).



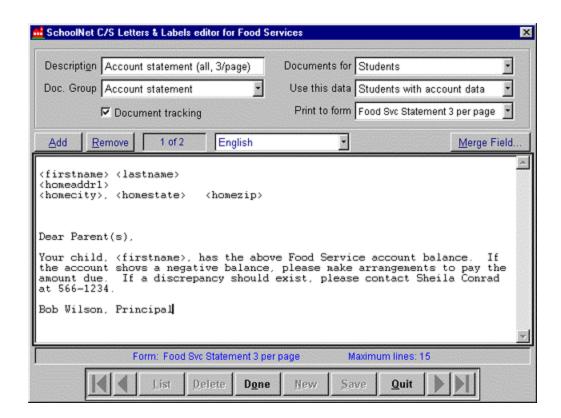
Merge Fields are represented in the text by **<firstname>**. Once a merge field has been inserted, it may be treated as any other text i.e.: place the cursor in front of the field and use the spacebar or Tab key to move the field or use the Enter key to insert carriage returns before the field, highlight to select then delete or copy, etc.

**Save** when finished. The length of the document is compared with the Print to form setting. You will be notified if the document length exceeds the maximum length permitted. If this is the case, then place the document back into edit mode and make adjustments.

**Preview and Evaluate** format. Several evaluations may be necessary to achieve the desired appearance. If, after previewing you wish to modify document format, return to the Document Editor, use the **List** or **VCR** buttons to locate the document, place into **Edit** mode and complete adjustments.

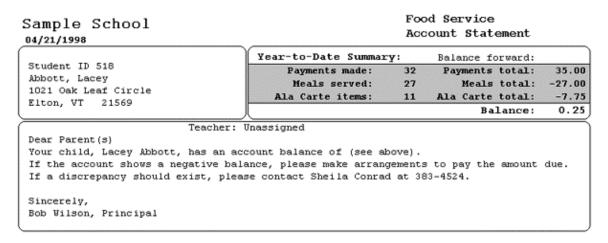
## <u>Create a Document Template – Account Statement</u>(continued)

**Sample Food Service Account Statement Template** (Print to form = Food Svc Account Statement)

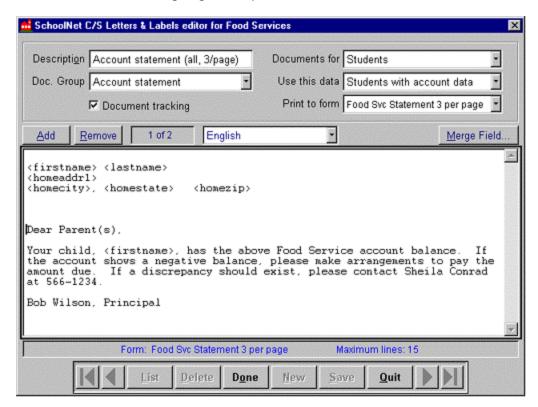


#### Sample Account Statement (displayed or printed)

Notice the preset account data fields, upper right portion of statement



## Create Additional Language Templates for a Document



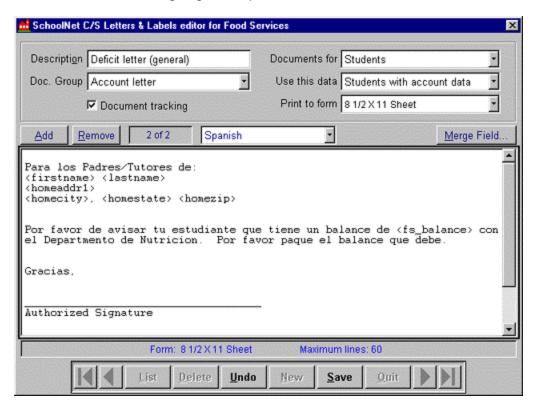
After the current template has been saved, click on the <u>Add</u> button at the top of the text area to add another language version of this document. **Add** present the **Select Language** screen.



Highlight the language for the new version, then click on the **Select** button. Only unused languages for this document are available for selection.

Complete the document text for the new language version and <u>Save</u>. Notice the text field by the <u>Add</u> and <u>Remove</u> buttons now shows "2 of 2", indicating two language version of this document are present.

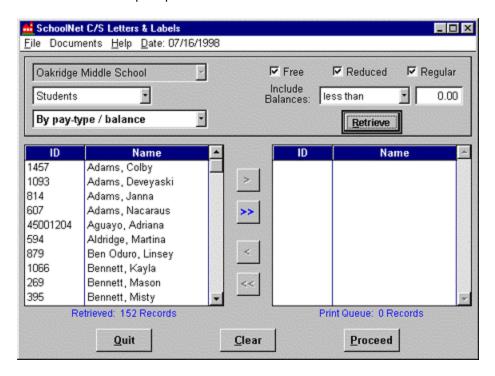
# <u>Create Additional Language Templates for a Document (continued)</u>



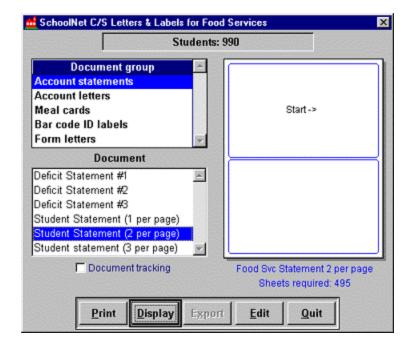
## Preview / Evaluate / Print Document

Exit the **Document Editor** and return to the **Letters & Labels** screen. Set **consumer selection** criteria.

Retrieve consumer print pool



Move consumers to **Print Queue >> Proceed** to document selection



## Preview / Evaluate / Print Document (continued)

#### **Select Document**

Select **Document Group** (highlight *Account Statements*)

Select **Document** (highlight the specific account statement -- this is the document *Description*)

**Print to form** format displays at right (*Start Print* location defaults to upper left position)

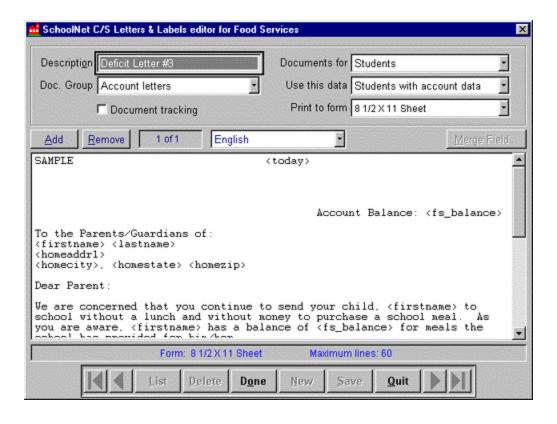
### **Display** to preview format.

Display is limited to the first 10 sheets. If format requires editing, close the preview, then click on the **Edit** button to access the template for this document. Adjust format, **Save**, **Quit** and re-**Display**.

#### **Print**

Select *Start print* position Click on the **Print** button

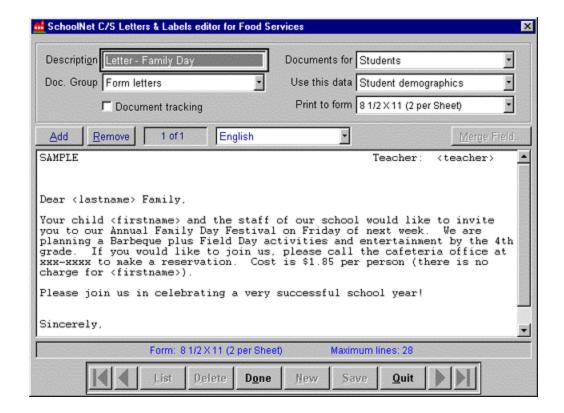
# Sample Account Letter Template and Document



# Sample Account Letter Template and Document (continued)

SAMPLE	07/16/1998
	Account Balance: -3.85
To the Parents/Guardians o Colby Adams	f:
412 East Baker Hwy Sandy, UT 84533	
Dear Parent:	
lunch and without money to	continue to send your child, Colby to school without a purchase a school meal. As you are aware, Colby has a the school has provided for him/her.
been provided for your chi your family is facing fina	on asking that you pay for the meals that have ld, to apply for free meals or to contact the school if notial difficuty that prevents you from being able to send at the present time. As of today you have failed to
you do not pay the charged arrangements. I urge you not heard from you by	be able to continue to provide meals for your child if amount or contact the school to make alternate to call me at 381-88888 to discuss this matter. If I hav _, your child will not receive the regular school meal, peanut butter sandwich and milk.
Your child is important!	Plese call me today!
Sincerely,	
Principal	

## Sample Form Letter Template and Document



SAMPLE Teacher: Caroline Anderson

Dear Aguayo Family,

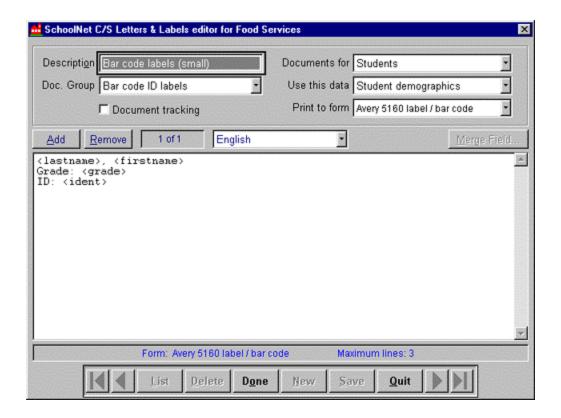
Your child Adriana and the staff of our school would like to invite you to our Annual Family Day Festival on Friday of next week. We are planning a Barbeque plus Field Day activities and entertainment by the 4th grade. If you would like to join us, please call the cafeteria office at xxx-xxxx to make a reservation. Cost is \$1.85 per person (there is no charge for Adriana).

Please join us in celebrating a very successful school year!

Sincerely,

The Cafeteria staff

# Sample Bar Code Template and Document



## Sample Bar Code Template and Document (continued)

Aguayo, Adriana Grade: 12

ID: 45001204



Chaney, Frederic Grade: 7

ID: 949

Dubreuiel, Bashiri

Grade: 7 ID: 556

Harper, Henry Grade: 7

ID: 1228

Harrell, Kayla Grade: 7

ID: 877

Johns, Christopher Grade: 7

ID: 884

Bussey, Kimberly Grade: 7

ID: 1579



Coachman, Misty

Grade: 7 ID: 753

Furno, Shannon

Grade: 7 ID: 1134

Harper, Joseph Grade: 7

ID: 184

Harrison, Jonathan

Grade: 7 ID: 1648

Lawson, Jessie Grade: 7



Carswell, George

Grade: 7 ID: 675



Crews, Megan Grade: 7



Graham, Wade Grade: 7



Harper, Misty Grade: 7 ID: 876



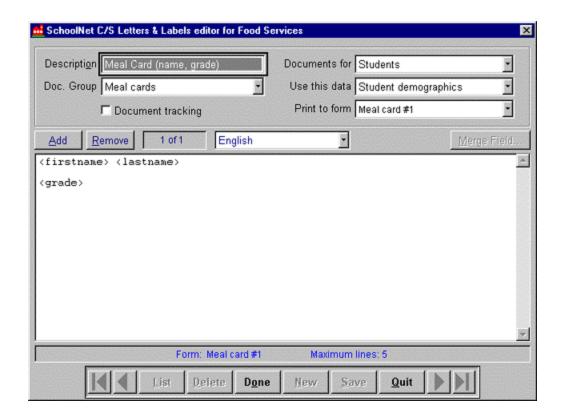
Hester, Marvin Grade: 7 ID: 199



Lockhart, Kaley Grade: 7 ID: 45001189



# Sample Meal Card Template and Document



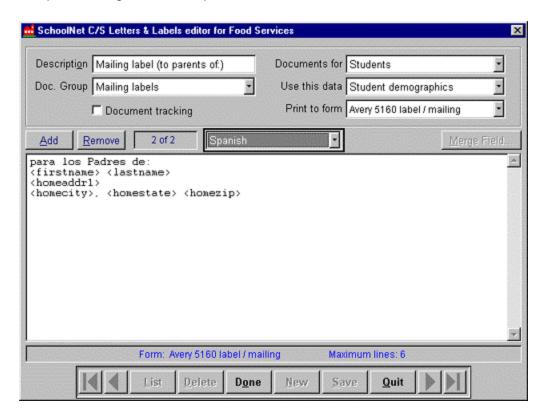
# Sample Meal Card Template and Document (continued)



# Sample Meal Card Template and Document(continued)



# Sample Mailing Label Template and Document



# Sample Mailing Label Template and Document (continued)

Para la Acosta familia:	To the Acuna family:	To the Adams family:
183 Troy Carter Road	1762 Rebecca S Waldron Rd	380 Beasley Lane
Sandy, UT 84533	Sandy, UT 84535	Midvale, UT 84519
To the Adams family:	To the Adams family:	To the Adams family:
6380 Hwy 32 W.lot 13	412 East Baker Hwy	1380 Fleetwood Circle
Sandy, UT 84533	Sandy, UT 84533	Sandy, UT 84533
To the Adams family:	To the Adams family:	To the Afaneh family:
869 Old Fitz. Hwy.	P.o. Box 1735	P.o. Box 144
Midvale, UT 84519	Sandy, UT 84533	Riverton, UT 84512
Para la Aguayo familia:	To the Alba Dantes family:	To the Aldridge family
1234 This St	P. O. Box 345	129 W. Jefferson Stree
Sandy, UT 74100	Midvale, UT 84519	Sandy, UT 84533
To the Alexander family:	To the Alexander family:	To the Allen family:
P.o. Box 307	P. O. Box 95	522 East Pine Street
Riverton, UT 84512	Midvale, UT 84519	Sandy, UT 84533
To the Anderson family:	To the Anderson family:	To the Anderson family
P.o. Box 1222	P.o. Box 132	P.o. Box 2283
Sandy, UT 84534	Riverton, UT 84512	Sandy, UT 84533
To the Anderson family:	To the Anderson family:	To the Anthony family:
P.o. Box 611	4507 Us Hwy 441 South	1386 Cobblestone Road
Midvale, UT 84519	Sandy, UT 84535	Sandy, UT 84533